Bulletin No: SD_IB_0007	Distribution Date: 07/07/2023	Effective Date: 07/01/2023
Contact Point: Metrc® Support	**Subject**: Patient Limit Calculations and Categorization of Product	
Reason: Metrc is providing guidance regarding Patient Status Lookup feature and how to properly categorize products for packaging, testing, & retail sale.		

Greetings Metrc Users,

Metrc wants to provide information regarding the Patient Status Lookup feature to provide guidance on how to currently reference the patient allotments as well as guidance on how to properly categorize products for packaging, testing and sale.

Please find on the following pages a detailed description of the guidance:

Patient Status Lookup Guidance

When utilizing the patient status lookup, there are three key numbers to reference.

1. Flower, Concentrate, or Infused Products Limit

2. Flower, Concentrate, or Infused Products Purchased

3. Flower, Concentrate, or Infused Products Available

As a reminder, all package sales map to the purchased number based on the item and category.

Metrc has a way to view the patient status lookup that allows for visibility into the three key numbers referenced above. Use the instructions below to confirm the amounts purchased and allowable limits before processing a sale.

To look up a patient status, go to the Lookup icon (magnifying glass) on the navigational toolbar. Select the magnifying glass and click on the Patient Status Lookup option as shown in **Figure 1**.
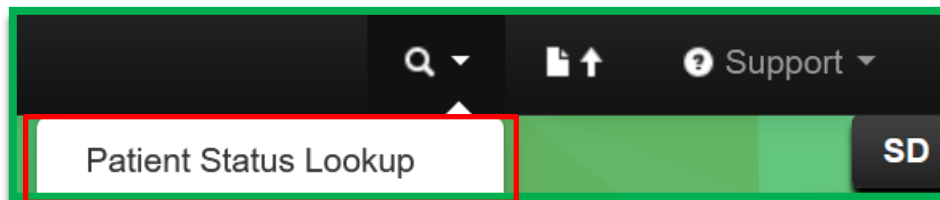

Figure 1: Lookup Icon

This will open the Patient Status Lookup action window as shown in **Figure 2** below. In this action window, the patient's identification number can be entered and then select the green "Look Up" button. This will populate the specific patient's information in the grid. The information will show the patient's flower limit, concentrate limit and/or infused limits, as well as amounts for each that have been purchased.
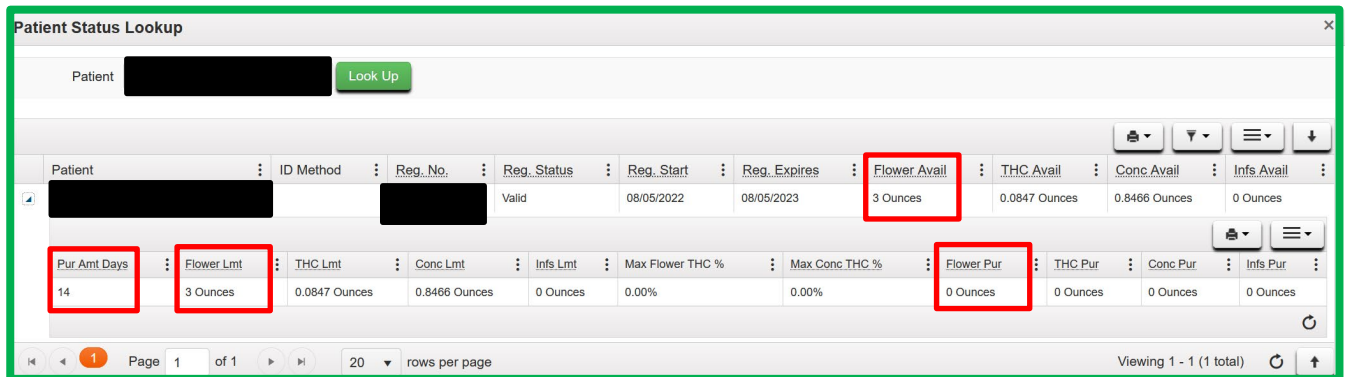
Figure 2: Patient Status Lookup View

Below in **Figure 3** is a breakdown of all the fields shown above in **Figure 2** to explain each individual field for better understanding prior to selling to any patient.

Field	Purpose / Clarification
Purchase Amount Days	Purchase limits are measured across a 14-day timeframe.
Flower Limit	The current cap for purchase of flower is 3 ounces per 14 days.
THC Limit	The current cap for purchase of infused THC is a limit of .0847 ounces per 14 days.
Concentrate Limit	The current cap for purchase of concentrate is .8466 ounces per 14 days.
Flower Purchase	The total amount of flower the patient has already purchased in the current 14-day period.
THC Purchase	The total amount of infused THC that the patient has already purchased in the 14-day period.
Concentrate Purchase	The total amount of concentrate that the patient has already purchased in the 14-day period.
Flower Available	The total amount of flower that the patient has available to purchase in the current 14-day period.
THC Available	The total amount of infused THC that the patient has available to purchase in the current 14-day period.
Concentrate Available	The total amount of concentrate that the patient has available to purchase in the current 14-day period.

Figure 3: Field Clarification Table

Categorization, Lab Test Batch & Required Testing for Product

Metrc and the SD DOH want to provide information on the proper way to categorize a product when packaging as well as the appropriate Lab Test Batch to select when testing that product. Please see the below charts that give the Product Categories, common items in those categories, and the appropriate Lab Test Batch to select when testing. Also included are the required testing for each Lab Test Batch.

Production Stage/Product	Product Category in Metrc	Required Testing/Lab Test Batch
Raw Plant Material	**Raw Plant Material** • Trim • Shake • Bud/Flower • Raw Pre-Rolls	**Raw Plant Material** • Microbials • Cannabinoid profile • Moisture Content • Pesticides • Heavy Metals • Mycotoxins • Filth & Foreign Material

Production Stage/Product	Product Category in Metrc	Required Testing/Lab Test Batch
Cannabis Concentrate/Extract	**Concentrate/Extract** • Live Resin • Rosin • Hash • Shatter • Oil (Not Vape Oil) • Wax • Budder • Crumble • Tinctures- (Infused Non-edible category) tested as a concentrate • Infused Pre-Rolls • Kief • Caviar • Moonrocks • Distillate • Vape Cartridges	**Concentrate/Extract** • Microbials • Cannabinoid profile • Pesticides • Heavy Metals • Mycotoxins • Solvents • Filth & Foreign Matter

Production Stage/Product	Product Category in Metrc	Required Testing/Lab Test Batch
Cannabis Infused Products	**Infused Products** Including but not limited to: • Cookies, Cakes, Brownies, baked goods • Gummy products • Beverage- dairy and non-dairy • Carbonated Beverages • Lotions, topicals, etc. • Salve, Balm, Patches, Capsules, Lozenges	**Infused Products** • Microbials • Cannabinoid Profile • Pesticides • Heavy Metals • Mycotoxins • Solvents • Filth & Foreign Material

Please feel free to contact support at support@metrc.com or 877-566-6506 with any questions.